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Telephone Tips and Techniques for Accessing Resources

Today, the Internet is the medium of choice when researching information or trying to track down products and services. No matter how much information you find on the Internet, however, sooner or later you'll have to pick up a telephone to verify the information, find answers to your very specific questions or arrange for the services you need.

To help you get the most out of these telephone conversations, below are some tips and techniques used by people who regularly do telephone research – such as reporters, customer service representatives, telephone support personnel, and persistent Family Caregivers. We hope they will help you find the information and resources you need in less time and with less frustration than you usually encounter.

The Big Three

- **Be Prepared.** Don't start the process when you're rushed. Make sure you have a big pad of paper, a pen, a glass of water, and a reasonable amount of time for the call.
- **Don't give up.** You have the right to information and respectful service. Be persistent and patient. Realize that sometimes it may take multiple calls to find out what you want. Depending on your needs, it may be that no one organization has all the answers.
- **Try not to put people on the spot.** Avoid receiving a defensive response by trying to enlist the support of the person you are calling. Be calm and friendly as you ask how they can help you find the information you need.

Before You Pick Up the Phone

- Review written material first, if at all possible. Underline key points, or names and phone numbers of people and organizations you think you'll want to call.

- For each encounter, make a list of the questions you want to ask. Write them down or type them up.
- Be clear about what information you need. If you can't explain what you want, it will be difficult for someone else to tell you where you can find it.
- Establish a system for yourself: a check can mean you got through to the person, a minus can mean you are waiting for a call back, and a star can mean you actually resolved your problem or found the answer you were seeking.
- Have a single notebook or organizer in which to record your information. Don't put it on little scraps of paper that can easily get lost. Try creating columns or headings at the top of the page: one for the name of the person, another for the name of the agency or company, another for the phone number, etc.
- If you're feeling nervous or jittery, give yourself a quick pep talk before making the calls. If it will help calm your nerves, do a little role-playing with the person you are caring for or a friend – say out loud what you plan to say to the person you're calling – to put you in the right mood and state of mind.
- Are you a morning person, or do you have the most energy in the afternoon? Know when you're usually at your best and most alert, and make your calls during that time.

Making Your Calls

There are many ways to make the person on the other end of the telephone line more likely to help you. Here are a few of them:

- Be aware of the pitch of your voice. Try to make it lower. According to the experienced telephone researchers who provided tips, a voice in a lower tone is often more pleasing than a high-pitched voice.
- Be modest. Tell the person on the other end of the line that you're not an expert, and that you hope they can give you some guidance. Enlist sympathy and, thereby, help.
- If you're calling someone you think you'll need to call again, try to establish a relationship. Find out the person's name and, if appropriate, some personal information if at all possible. Next time you call you can reference this information and you'll truly have an ally.
- Avoid "yes" or "no" questions. They don't open people up. Read the next two questions: "Do you know where I can find accessible bus service?" With this wording, "yes" or "no" is the likely answer. The following phrasing creates the

possibility of dialogue: “Where can I find information on accessible bus service in our town?” The point is to always leave people room for suggesting possibilities and solutions.

- Be empathetic – remember that we all have tough days. If the person you’re calling sounds tired or rushed, recognizing that they may have a lot on their plate – for example, “I realize it is late in the day and you must be tired, but I really need your help” – can be a good way to build a relationship and get the information you need.
- Make the person feel like your mentor. Compliment helpfulness, even if you didn’t quite get what you needed. The next time you call, people will be more likely to go out of their way to help you.
- If the person you want isn’t in, rather than just leaving a call back number, find out when he or she is expected. This shows you want to make things easier – and you might learn valuable information, such as the person just left for a two-week vacation. If you hadn’t asked, the information might not have been offered. If you are transferred to voicemail, leave a short but specific message with times you will be available. It can eliminate the game of telephone tag.
- Be polite, but don’t allow yourself to be brushed off. You have a right to information. If you’ve really tried to get help but are constantly meeting roadblocks, ask to speak to a supervisor.
- Always get the name of the person to whom you are speaking. It’s helpful when you get conflicting information and you can say, “When I spoke with Mary S. in the department of such-and-such, she said...” Knowing the person’s name also shows you really listened and puts you in control.
- Even though the person on the other end of the line can’t see you, it may help you personally to feel like you’re “suited up” for your phone calls. One day try making calls while wearing business clothes. Does it make you feel more in control, more authoritative? Another day wear comfortable jeans and a T-shirt. Any difference? Whatever works for you, whatever makes you comfortable and gets results, is the right approach.

If At First You Don’t Succeed...

Getting information and breaking through information log jams can be daunting. There often doesn’t seem to be any rhyme or reason to the rules that have been established. When one approach doesn’t work, try another. Be creative. Turn an idea on its head and try looking at it from another direction.

Remember, you don't have to find everything out yourself – enlist the help of trusted family members and friends. Put the word out that you are looking for certain information or need help navigating a particular organization or system. Ask a friend, colleague, or relative to lend you a hand – especially in a time of crisis. You'll be giving those who want to help a straightforward task they can sink their teeth into. There is more than one way to get information or resolve a problem. It isn't always easy, and there are no guarantees, but following some of the advice here may help increase your odds of getting what you need.

Adapted, with permission, from the National Family Caregiver Association (NFCA) resource “Accessing Resources: Telephone Tips & Techniques That Can Help.” The NFCA is now the Caregiver Action Network and has a [Family Caregiver Toolbox](https://www.caregiveraction.org) of resources and information.

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